

Introduction

The "Bid Opening & Award & Purchase Order (PO) Creation" Quick Reference Guide is designed to provide the minimum steps necessary in comparing quotes to submit a reward recommendation for approval and understanding how to properly create a Purchase Order.

Upon opening a bid from the Bid Tabulation, it is recommended that the Buyer review the Vendors Quote Attachments and their response to the Terms and Conditions. Once you verify the quotes have been received and are complete, proceed to begin comparing the Quotes to make an award recommendation.

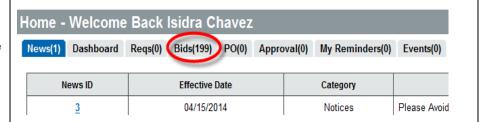
Pre-requisites

You must have the Basic Purchasing Role.

Steps

Step 1:

a.) From the Home Screen once logged in, select the **BidsTab**.



Step 2:

Once you click the Bids Tab, several sub-tabs will appear below.

a.) Click the **ready to open** subtab.



<u>Step 3:</u>

A list of Bids will display.

a.) Find your bid from the list and click the **open bid** link.

Note: If responses have been received, an "open bid" link appears AND if no responses have been made you will see a "create a quote" link, which allows the buyer to enter a quote manually from a bid received offline.

| AGENCY14B0001885 | Administrator System | Kathy's Kayak | 09/08/2014 08:19:00 AM | Create new quote |
|------------------|----------------------|---------------|------------------------|------------------|
| AGENCY14B0001888 | Linda Ross | Fun & Games | 09/15/2014 10:58:00 AM | Create new quote |
| AGENCY14B0001891 | Isidra Chavez | coffee | 09/05/2014 12:05:00 PM | Open Bid |
| | | | | |



Step 4:

Upon clicking the Open Bid link, the **Summary Tab** displays.

a.) Scroll down to the bottom of the page & click the **Bid Tab.**

Note: You have the option to view the **quote history** button, which displays a complete list of all submitted Quotes.



Step 5:

You will be directed to the **Bid Tabulation** page.

- a.) Click the Quote # link and review the Vendors information, including Attachments and their response to the Terms & Conditions..
- b.) Close the Quote window once complete.

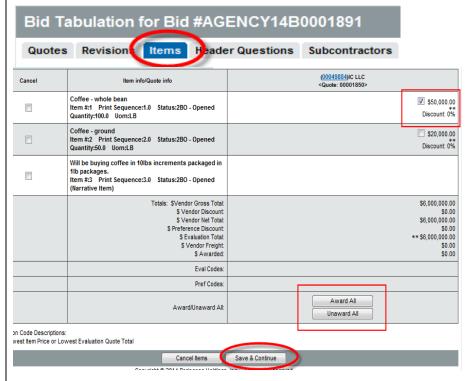




Step 6:

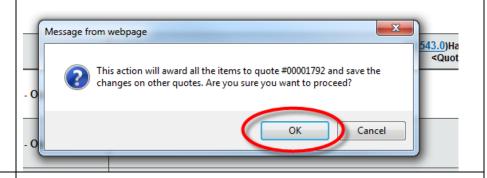
- a.) Click on the Items Tab.
 You are now able to view
 and compare quotes to make
 your Award
 Recommendation.
- b.) Select your Vendor(s) by marking the check box OR you can also select the **Award All** button.

Note: The award can be to one Vendor or split between multiple Vendors.



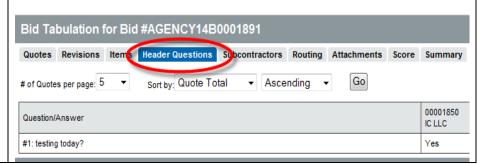
Step 7:

a.) Confirm your selection by clicking the **OK** message.

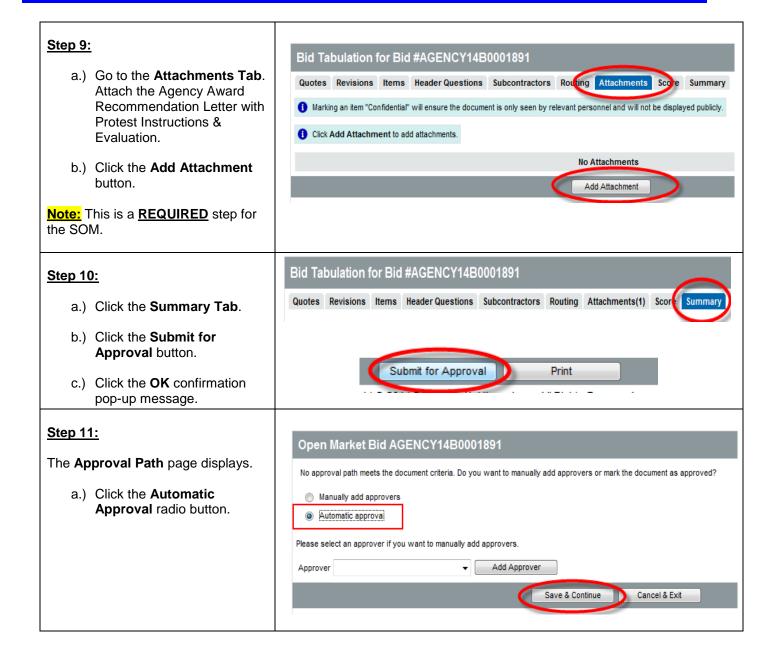


Step 8:

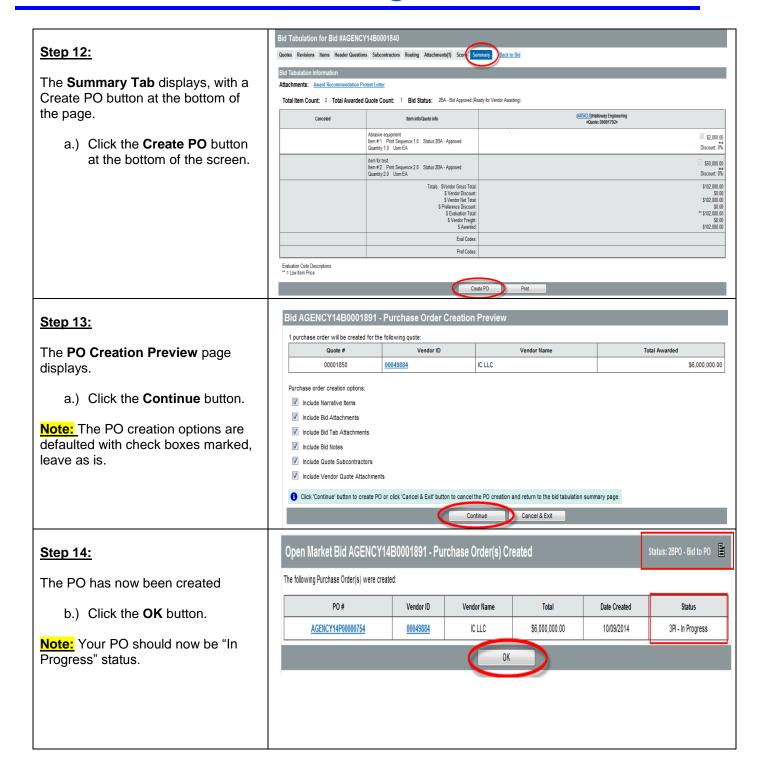
a.) Select the **Header** Questions tab to review responses from Vendors that you may have.











The page refreshes back to the Home Page screen.



Step 15:

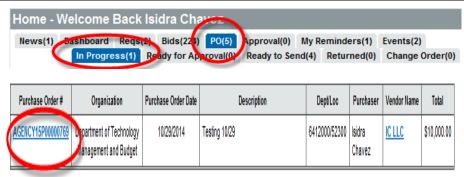
Follow the steps below if you will be submitting your PO for approval:

a.) Select the PO tab.

PO defaults to the **In Progress Subtab.**

b.) Click the PO link.

Note: It is recommended to not approve your PO until you have issued the PO in ADPICS to the Vendor and your protest period is over.



Step 16:

The page defaults to the **Summary Tab.**

- a.) Click the General Tab.
- b.) Cut/paste the ITRAC# from the Alternate ID field to the ITRAC# field. Enter your PO, DPO, or BPO # from ADPICS into the Alternate ID field.

This allows you to search for this document in Buy4MI using that # if needed for cross-referencing.

